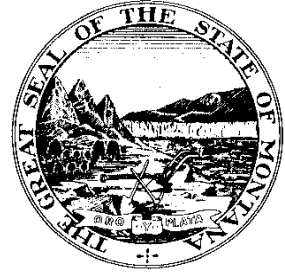


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## INSTRUCTIONS (Revised 2/04) FORM L-5 LOBBYING FINANCIAL REPORT

### WHO IS REQUIRED TO FILE A FORM L-5?

A Principal who makes payments or has agreed to make payments exceeding \$2,150 in a calendar year to one or more individuals for the purpose of promoting, opposing, or modifying the introduction or enactment of legislation on behalf of the Principal must complete and file a Form L-5.

### WHAT INFORMATION IS TO BE REPORTED?

The following information is required:

- reporting period for which the report is being submitted;
- name(s) of lobbyist(s) receiving payment(s) for the purpose of promoting, opposing, or modifying the introduction or enactment of legislation on behalf of the Principal and the total amount of those payments paid by the Principal during the reporting period;
- date lobbyist ceased representing the Principal;
- total amount paid to individuals, other than registered lobbyists, who are employed or retained for the purpose of promoting, opposing, or modifying the introduction or enactment of legislation on behalf of the Principal;
- itemized expenses paid during the reporting period;
- each bill draft request, bill number, or legislative issue for which a major effort was exerted to promote, oppose, or modify the introduction or enactment of legislation;
- name of payer and amount of each earmarked contribution and membership fee of \$250 or more paid to the Principal for the purpose of promoting, opposing, or modifying the introduction or enactment of legislation; and
- name of payee and of beneficiary of each payment of \$25 or more to the benefit of any public official and \$100 or more to the benefit of more than one public official as provided in Administrative Rules of Montana 44.12.209.

### WHEN MUST A FORM L-5 BE FILED?

An initial report must be filed for the reporting period in which:

- a) payment that exceeds \$2,150 is made; or
- b) an oral or written agreement is entered into to pay one or more individuals more than \$2,150; for the purpose of promoting, opposing, or modifying the introduction or enactment of legislation on behalf of the Principal.

### WHERE MUST A FORM L-5 BE FILED?

- One copy is to be filed with the Commissioner of Political Practices. **The report may be faxed provided the original report is submitted to the Commissioner immediately thereafter.**
- One copy is to be retained for three (3) years by the Principal. A Principal must also retain all records relied upon to prepare the L-5.

The information on Form L-5 is required in accordance with Montana Code Annotated 5-7-208, 5-7-212; and Administrative Rules of Montana 44.10.202.